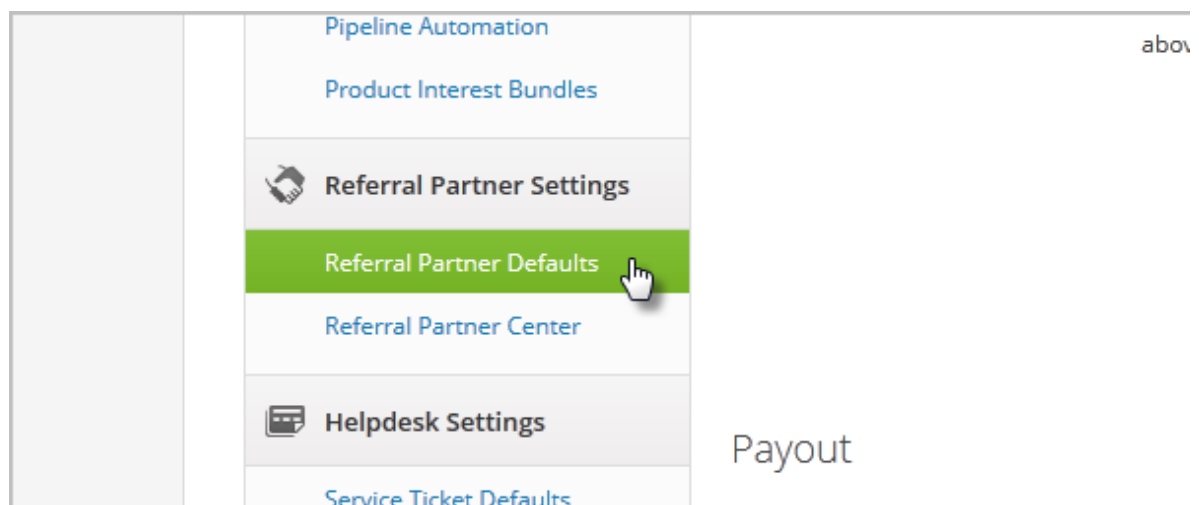


Referral Partner Tracking & Payout Options

The first step to set up a referral partner program is to go through the **Partner Default Settings** page and choose how you want to track referral partners and how your payouts work.

1. Go to **CRM > Settings** in the main navigation menu
2. Click on **Referral Partner Defaults** in the settings menu.



3. **Referral Partner Code Prefix** simply adds a special prefix that is applied to all URLs that are generated for your referral partners. This is optional.

4. **Skip notifications on orders and web forms?** - This setting allows you to turn off email notifications that referral partners receive when someone they referred to you buys something or fills out a web form.
5. **How to choose a referral Partner:** This setting allows you to manage which referral partner gets credited if a prospect clicks on links offered by multiple referral partners. By default, Infusionsoft assigns commission to the *latest (or last) referring partner*. **Latest referring** is the most commonly used setting for this situation, but you can change it to *first referring* if you prefer to give credit to the referral that got the first click.
6. **Referral Partner tracking method:** By default, Infusionsoft identifies the referring partner based on a tracking cookie on the referral's computer. If you want the Referral partner to be automatically credited for future sales despite not being cookie'd, change this to **Referral history and cookies**. When a sale is made, Infusionsoft will check the cookie first, then the referral partner history. If you **only** want to pay referral partners for cookie'd sales, change it to **Only cookies**.
7. **Use IP Address:** This is just another backup mechanism as above for paying referral partners for subsequent orders their referrals make. This is optional. Infusionsoft will check for a cookie, then the referral partner history, then IP address.
8. **Custom Referral Partner Link URL:** This setting is covered here.
9. **Referral Partner # of Levels:** The default setting is 2. This means that a partner who recruits (parent affiliate / level 2) other referral partners for you (child affiliate / level 1) is eligible for commission on the sales their recruits make. Change this setting to 1 if you do not plan to pay commissions to more than one referral partner for each sale.
10. **Payout Type (Lead/Sale):** Referral commissions are calculated after a sale takes place in Infusionsoft; however, if you are using referral partners to drive leads to a direct sales team, you may want Infusionsoft to calculate a commission both for the partner who referred the lead and the sales rep who closed the deal. In this case, you would check both boxes. Just having the sale commission box checked is most typical.

Payout

Referral Partner # Levels: 1

Payout Type: Lead ☐

(Lead/Sale) Sale ☒

Payout Type: Amount ☐

(Amount/Percent): Percent ☒

Use 'Pay If Unused'? Yes ☐ No ☒

Save

Please Note! Infusionsoft does not automatically pay commission on a lead - a sale must be made in order for a commission to be paid in Infusionsoft.

11. **Payout Type (Amount / Percent):** You can pay referral partners a flat dollar amount or a percentage of the sale or both.
 12. **(Optional) Use "Pay if Unused?":** You can ignore this setting and set it to No. It only applies to commission structures that have more than one partner level (see above) and who need to pay an additional commission to a sale partner when they make a sale that does not involve a level 2 or level 3 partner.
 13. Click on the **Save** button to apply the updates. This will update all of the existing referral partner program records.
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